



Foreign Agricultural Service

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## **Germany**

### **Fishery Products**

# **Opportunities and Limitations for Fish and Fishery Products with German Consumers**

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#### **Report Highlights:**

**BSE has had a positive long-term effect on German fish consumption. Market promotion should focus on taste and fish being a delicacy rather than the health benefits of eating fish.**

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Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Berlin [GM1], GM

In a recent seminar organized by the Berlin Trade Fair Organization and a leading German food and food retail newspaper Mr. Dietmar Pech-Lopatta of the Society for Consumer Research (Gesellschaft für Konsumforschung), Nürnberg and Professor Dr. Gert Gutjahr of the Institute for Market Psychology in Mannheim reported on current consumer trends in the fish market. The most important trends are summarized below.

Currently the general climate for consumption is rather negative in Germany. Turnover of the German food retail amounted to 138 billion U.S. \$ (128.7 billion Euros) in 2002, down 2.6 percent compared to 2001. At the beginning of 2003, surveys show that due to tax increases people expect their net income to decrease by about 10 percent compared to the much higher average of the previous years. This combined with concerns about the security of retirement funds has led to a 45 percent drop in consumer willingness to spend money. Consumers also generally tend to spend more of their money at discount stores. This trend also applies to fish products. In 2002, 45.5 percent of the volume but only 34.4 percent of the value were of fish products sold at discount stores.

Fish sales by volume at the various retail segments (in percent of total fish product sales)

	2000	2002
Discount stores (e.g. Aldi)	41.1	45.5
Supermarkets	37.5	36.2
Specialty fish shops	8.0	6.4
other (e.g. farmers markets)	13.4	11.9

Source: Society for Consumer Research (Gesellschaft für Konsumforschung), Nürnberg

Fish consumption has benefitted from food safety concerns after the detection of the first BSE case in Germany in November 2000, which caused consumers to turn away from beef. The volume of fish purchased by German households increased by 18 percent in 2000 compared to 1999 and by 12 percent in 2001 compared to 2000. When consumers started switching back to beef in 2002, fish purchases dropped by 6.6 percent in 2002 compared to 2001, but are still higher than before the detection of BSE. The percentage of households buying fish at least once a year increased from 83 percent in 2000 to 84 percent in 2001 and 87 percent in 2002. The increased attraction of fish therefore proves to be more than a short-lived BSE-effect. However, the "new" fish customers still buy smaller volumes so that the average amount bought per households decreased. In 2002 the average German household purchased fish products 16 times a year (consumption in restaurant not included), buying a total of 9 kg at a value of U.S. \$ 65 (61 Euros). In 2000 the per-capita-consumption of fish (including consumption at restaurants) amounted to 13.7 kg, which was still below the world average of 15.9 kg in 2000 (latest data available).

When comparing the attitudes of different consumer groups towards fish, fish enjoys the highest comparative popularity with people who favor gourmet-type cooking, followed by traditional cooking, and then by people who highly value health and environment. Fish is less popular with consumers who

cook convenience-type food or the fast-food-lovers. 40 percent of "fish-buyers" are over 60 years of age, while this age group only accounts for 30 percent of the total population.

Limitations for an increase in fish consumption are often related to misconceptions by consumers or a lack of information. Many consumers are irritated by contradictory or negative press coverage. While a lot of articles stress the health benefit of fish consumption, old myths about "poisonous fish" and "fishbones perforating the gullet" are hard to eradicate.

Press releases about a single endangered fish species are mentally transposed to all fish and lead to the belief that by refraining from eating fish, one could help preserve fish wild life. Fish from aquaculture is not sufficiently labeled to enable consumers with this concern to eat fish and still feel good about themselves. Others are repelled by stories about pesticides and bactericides allegedly used in aquaculture, or by stories about fish caught in contaminated bodies of water.

Many of the consumers who do eat fish regularly, do so on Fridays in line with traditional Catholic observances or for health reasons. In both cases, the connotation for fish is more one of renunciation and sacrifice than of taste and pleasure.

In order to increase fish consumption it is important to improve the public perception of fish. Possible ways to achieve this include:

- stressing taste, quality and fun of eating fish, rather than focusing on health benefits only;
- targeting children to eat fish with child-oriented products, e.g. fish sticks, rather than forcing them to eat fish they don't like;
- accustoming "new" users to eating fish with easy to cook recipes;
- increasing availability of fish in restaurants every day of the week and not only Fridays;
- improving and increasing public relation activities about the environmental sustainability of catch methods, and MSC certified production.

Note: Exchange rates used in this report are for:

U.S. dollar/ i	US\$1 = Euro 0.9316
i /U.S. dollar	i 1 = U.S. dollar 1.0734

(as of February 12, 2003, Handelsblatt)